

INFORMAL PROBATE

2

Application for Appointment as Personal Representative

Part 2: The Appointment, Notice of Appointment,
Inventory and Appraisement
(Forms Packet)

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SELF SERVICE CENTER

INFORMAL PROBATE APPLICATION FOR APPOINTMENT AS PERSONAL REPRESENTATIVE

PART 2: The Appointment, Notice of Appointment, Inventory and Appraisement

How to assemble these documents: This packet contains court forms about the appointment, the notice of appointment, and the inventory and appraisement whether there was a will or not. Be sure the documents are in the following order:

Order	File Number	Title	No. Pp.
1	PBIP4ft	Table of forms in this packet	1
2	PBIP4k	Checklist for Appointment	1
3	PBIP41f	<i>"Notice of Appointment"</i>	2
4	PBIP42f	<i>"Proof of Mailing or Delivery of Notice of Appointment and/or Admission of Will to Probate and Order to Personal Representative"</i>	1
5	PBIP43f	<i>"Notice to Creditors"</i>	1
6	PBIP44f	<i>"Letter to Publisher About Creditors"</i>	1
7	PBIP45f	<i>"Proof of Notice to Creditors"</i>	1
8	PBIP46f	<i>"Inventory and Appraisement"</i>	4

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SELF-SERVICE CENTER

INFORMAL PROBATE APPOINTMENT OF PERSONAL REPRESENTATIVE AND ADMISSION OF WILL (if applicable)

CHECKLIST

Use the forms and instructions in this packet only if the following factors apply to your situation:

- ✓ You have been appointed the Personal Representative of the estate of a person who died.
- ✓ You have signed the Acceptance of Appointment and are ready to give notice that you have been appointed.

READ ME: It is very important for you to know that when you sign a court document, you may be helping or hurting your court case. Before you sign any court document, or get involved with a court case, it is important that you see a lawyer to make sure you are doing the right thing. The Self-Service Center has a list of lawyers who can give you legal advice and can help you on a task-by-task basis for a fee. If you want to know more about our list of lawyers and our list of mediators, ask the Self-Service Center staff.

Name of Person Filing Document: _____
 Address: _____
 City, State, Zip Code: _____
 Telephone Number: _____
 Attorney Bar Number (if applicable): _____
 Representing ☐ Self or ☐ Attorney for _____

SUPERIOR COURT OF ARIZONA MARICOPA COUNTY

In the Matter of the Estate of _____

Case Number PB: _____

NOTICE OF:

☐ **INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE**

(Person died without a Will - "Intestate Estate"),

OR

☐ **INFORMAL PROBATE OF A WILL
AND INFORMAL APPOINTMENT OF A
PERSONAL REPRESENTATIVE**

AND ADMISSION OF WILL (Person died
with a Will – "Testate Estate")

_____ ☐ an Adult or ☐ a Minor, deceased

1. This Notice is being sent to those persons who have, or may have, some interest in the Estate of the person named in the court caption above, who died on _____ (date).

2. MY NAME AND ADDRESS:

My name is: _____

My address is: _____

3. **DOCUMENT FILED:** On _____ I filed the following document with the court:
 (Month/Day/Year)

☐ Application for Informal Appointment of Personal Representative because the person died without a Will - "intestate estate," OR

☐ Application for Informal Probate of Will and For Informal Appointment of Personal Representative because the person died with a Will -- "testate estate"

4. **APPOINTMENT AS PERSONAL REPRESENTATIVE.** On _____ (date)
 the Probate Registrar appointed _____ (name)
 as Personal Representative of the Estate of the person who died.

5. **BOND:** ☐ No bond is required or ☐ a bond in the amount of \$_____ is required which has been filed with the court.

6. **LOCATION OF PAPERS:** Papers relating to the Estate are on file with the Court at the address checked below, and are available for your inspection.

Case No. _____

☐ **PHOENIX:** Old Courthouse
125 West Washington, 1st Floor
Phoenix, AZ 85003-2205

☐ **MESA:** Southeast Court Facility
222 East Javelina, 1st Floor
Mesa, AZ 85210-6201

☐ **PHOENIX:** Northeast Court Facility
18380 N. 40th St.
Phoenix, AZ 85032

☐ **SURPRISE:** Northwest Court Facility
14264 W. Tierra Buena Lane
Surprise, AZ 85374

7. **COPY OF WILL. (Only if there is a Will)** A copy of the Will is attached to this notice for you. You have 4 months from the date you receive this Notice to begin a formal probate case.

DATED: _____
(Month/Day/Year)

Signature

Print Name

Name of Person Filing Document: _____
 Address: _____
 City, State, Zip Code: _____
 Telephone Number: _____
 Representing ☐ Self (Without a Lawyer) OR
 Attorney for _____

SUPERIOR COURT OF ARIZONA MARICOPA COUNTY

In the Matter of the Estate of _____

Case Number: _____

☐ an Adult or ☐ a Minor, deceased

PROOF OF DELIVERY OR MAIL OF
☐ **NOTICE INFORMAL APPOINTMENT
OF PERSONAL REPRESENTATIVE**
☐ **ADMISSION OF WILL TO PROBATE**
☐ **ORDER TO PERSONAL
REPRESENTATIVE**

STATE OF ARIZONA)
 COUNTY OF MARICOPA) ss.

1. DOCUMENT: I delivered or mailed by first class mail, postage prepaid a copy of the following document: (Check one box)

- ☐ **(If no Will exists)** NOTICE OF INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE and separate ORDER TO PERSONAL REPRESENTATIVE (Person died without a Will - "Intestate Estate"), OR
- ☐ **(If a Will exists)** NOTICE OF ADMISSION OF A WILL AND INFORMAL APPOINTMENT OF A PERSONAL REPRESENTATIVE and separate ORDER TO PERSONAL REPRESENTATIVE (person died with a Will – "Testate Estate").

2. PERSONS. I mailed or delivered the document to the following persons entitled to notice of this case. (if you need more room, attach a sheet of paper):

NAME	ADDRESS	DATE MAILED OR DELIVERED
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Signature _____ Print Name _____

SUBSCRIBED AND SWORN TO before me this date: _____ by _____
 (Month/Day/Year)

My Commission Expires: _____

 Deputy Clerk/Notary Public

Name of Person Filing Document: _____

Address: _____

City, State, Zip Code: _____

Telephone Number: _____

Attorney Bar Number (if applicable): _____

Representing ☐ Self (Without a Lawyer) OR ☐ Attorney for _____

SUPERIOR COURT OF ARIZONA MARICOPA COUNTY

In the Matter of the Estate of

Case Number: _____

☐ an Adult or ☐ a Minor, deceased

NOTICE TO CREDITORS OF INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE AND/OR INFORMAL PROBATE OF A WILL

NOTICE IS GIVEN THAT:

1. **PERSONAL REPRESENTATIVE:** (name) _____
has been appointed Personal Representative of this Estate on (date). _____
Address: _____
2. **DEADLINE TO MAKE CLAIMS.** All **persons** having claims against the Estate are required to present their claims **within four months** after the date of the first publication of this Notice or the claims will be forever barred.
3. **NOTICE OF CLAIMS:** Claims must be presented by delivering or mailing a written statement of the claim to the Personal Representative at (address) _____

4. **NOTICE OF APPOINTMENT.** A copy of the Notice of Appointment is attached to the copies of this document mailed to all known creditors.

DATED: _____

Personal Representative_____
Print Name

Print Name

Print Address

Month/Day/Year

Name of Newspaper

Address

RE: Case Number _____

To Whom It May Concern:

Enclosed is a court file-stamped copy of the Notice to Creditors in the above matter. In accordance with A.R.S. §14-3801, please publish this Notice in your newspaper once a week for three weeks in a row.

Enclosed is a check or money order in the amount of \$_____ for the cost of the publication.

Upon receipt of this letter, please call me at _____ to tell me when the first publication will occur. When all three weeks of publication have been completed, please file the original Affidavit of Publication with the Court and send me one copy.

Thank for your help in this matter.

Yours truly,

Sign Your Name

Enclose: Copy of Notice to Creditors
 Check or Money Order (call newspaper ahead of time to find out what the charge is)

Representing ☐ Self (Without a Lawyer) OR
Attorney for

**SUPERIOR COURT OF ARIZONA
MARICOPA COUNTY**

**PROOF OF DELIVERY OR MAILING OR
PUBLISHING NOTICE TO CREDITORS
OF INFORMAL APPOINTMENT OF
PERSONAL REPRESENTATIVE AND/OR
INFORMAL PROBATE OF A WILL**

1. NOTICE. I delivered or mailed by first class mail, postage prepaid a copy of the Notice to Creditors to the following known creditors entitled to such notice (if you need more room, attach a sheet of paper):

Deputy Clerk/Notary Public

Name of Person Signing Document: _____
 Your Address: _____
 Your City, State, Zip Code: _____
 Your Telephone Number: _____
 Attorney's Bar Number (if applicable): _____
 Representing ☐ Self (Without a Lawyer) OR ☐ Attorney for _____

SUPERIOR COURT OF ARIZONA MARICOPA COUNTY

In the Matter of _____

Case Number: PB _____

_____ A Deceased Person

INVENTORY AND APPRAISEMENT AND PROOF OF MAILING

STATE OF ARIZONA)
 COUNTY OF MARICOPA) ss.

I am the Personal Representative for the person who died and I state under oath as follows:

1. **TRUE AND CORRECT STATEMENT.** The following inventory of property is a true and correct statement of all the property known to me to be owned by the person who died at his or her death.
2. **TOTAL ESTIMATED VALUE.** The total estimated value of all real and personal property in the estate, as supported by the following itemization of property, is \$ _____
3. **DESCRIPTION OF PROPERTY AND DEBT.** This document accurately describes each item of property, estimates the fair market value of the property as of the date of my appointment, describes the nature of the property as community or separate property, and itemizes the type and amount of all debts, mortgages, or liens relating to each item of property.
4. **NOTICE TO OTHER PARTIES.** A copy of this document was hand-delivered or mailed by first class mail, postage prepaid, to the following persons: (Attach additional paper if necessary.)

Name	Address	Relationship to Person who Died	Date Mailed or Delivered
------	---------	------------------------------------	-----------------------------

SIGNATURE: _____

Subscribed and sworn to before me this ____ day of _____,

by _____.

My Commission Expires: _____

Deputy Clerk/Notary Public

INVENTORY AND APPRAISEMENT OF PROPERTY IN ESTATE

(use additional sheets of paper if necessary)

Inventory date: _____

REAL PROPERTY**A. GENERAL INFORMATION:**

Property Description and Address	Community OR Separate Property	Estimated Value in Dollars	Dollars of Debt
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

Total estimated fair market value of real property: \$ _____

Total estimated debt on real property: \$ _____

B. INFORMATION ABOUT REAL PROPERTY ITEMS LISTED ABOVE THAT WERE APPRAISED:

Name	Address	Item Number Above

B. (Continued) INFORMATION ABOUT REAL PROPERTY ITEMS LISTED ABOVE THAT WERE APPRAISED:

Name	Address	Item Number Above

PERSONAL PROPERTY**A. GENERAL INFORMATION:**

Property Description	Community OR Separate Property	Estimated Value in Dollars	Dollars of Debt
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			

Total estimated fair market value of personal property: \$ _____

Total estimated debt on personal property: \$ _____

B. INFORMATION ABOUT PERSONAL PROPERTY ITEMS LISTED ABOVE THAT WERE APPRAISED:

Name	Address	Item Number Above